

Cruse Bereavement Care: Strategic Priorities

Introduction

Cruse Bereavement Care's **mission** is firmly defined. Cruse 'exists to promote the well-being of bereaved people and to enable anyone suffering a bereavement caused by death to understand their grief and cope with their loss'. This mission statement should determine the fundamental direction of our **strategy**; but the strategic priorities that we adopt should be reviewed from time to time and selected in order to put Cruse in a position to fulfil its mission most effectively in the particular environment and circumstances that it faces.

In October 2005 we began such a review in order to define Cruse's **strategic priorities** for the next few years. Council Members, Regional Chairs and the Senior Management Team contributed to the review, and the process and its outcomes are summarised in the following pages.

Our intention is that our **3-Year Business Plans**- both National and Local- should give expression to our strategic priorities through key objectives that we pursue over the period to 2009. Our **Annual Operating Plans** for each of the years within this period will take the objectives identified in our Business Plans to a greater level of detail, providing specific operational targets against which we can measure our progress in the course of each year. In this way we can achieve a clear and logical progression from Cruse's mission, through its strategic priorities, business plans and operational plans, to our charity's day-to-day activities.

Cruse Today

The starting point for our strategic review was a full and objective appraisal of Cruse Bereavement Care's current position. By assessing where Cruse is today and envisioning where we want the organisation to be in a realistic timeframe, we arrived at the strategic priorities that we must follow in order to reach our goal.

Over the period of almost fifty years since it was founded, Cruse has grown to become a nationwide charity with a reputation in the field of bereavement care which extends beyond the United Kingdom. However it operates today in a complex and changing environment in which its recognised strengths are balanced by a number of significant challenges.

Cruse can be proud of its many strengths which include:

- A clear and socially valuable mission.
- A quality service supported by well-defined standards and an established habit of training and supervision.
- An ability, demonstrated on many occasions throughout its history and again in the recent past, to respond promptly to support those bereaved by disasters.
- A number of innovative services, including its website for bereaved children.
- Its ability to reach a large number of bereaved people through its National Helpline.
- Over 5,000 skilled and committed bereavement volunteers within a nationwide local network.
- An exceptionally high ratio of bereavement volunteers to supporting staff which allows a

- high proportion of its resources to be used for directly charitable purposes.
- An established reputation for thought leadership which has allowed it to influence policy on issues affecting bereaved people.
- A good range of communications materials such as Bereavement Care.

This array of strengths provides a strong foundation for the future, but to sustain its record of achievement and develop still further Cruse must respond to the numerous challenges that it faces, which include:

- Although Cruse receives over 170,000 enquiries each year, its coverage in London and some major cities is relatively weak; it needs to increase the number of its clients- and bereavement volunteers- from some under-represented groups; and there is scope for the provision of more services for children and young people.
- There is a shortage of volunteers in some areas, which leads to delays in the provision of services to clients in the face of rising demand; and the organisation suffers from an acute shortage of permanent staff and management volunteers.
- Cruse's financial reserves are below target and are further threatened by increasing competition for central government funding; and there are currently relatively few funding arrangements with primary Care Trusts, Local Authorities and other local agencies which benefit from the charity's work.
- The organisation's use of IT for internal communications is relatively low.
- Despite a strong reputation in its specialist field, Cruse has a low profile and suffers from poor name recognition when compared with many charities of similar size.

Approach

Our strategic priorities are designed to build on current strengths while addressing the challenges that we face. And in order to ensure that they pay heed to all dimensions of Cruse's business and the needs of all of its stakeholders, they have been defined under four headings:

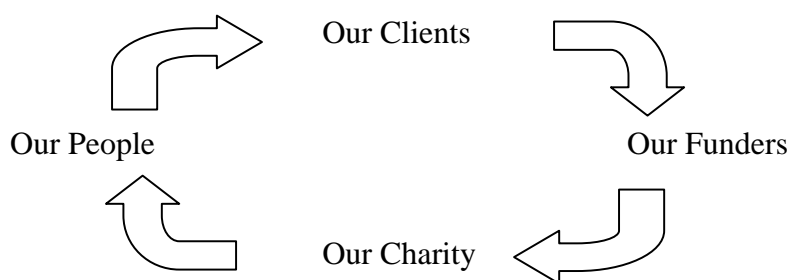
Our Clients....covers the bereaved people to whom Cruse provides support and those, in particular parts of the country or from particular groups, for whom we could do more; the range of services that we provide both to individuals and to organisations; and the terms on which we offer our services.

Our People....covers the way in which we treat our people- our staff, bereavement volunteers and management volunteers; how we recruit the most able, develop them, train them and use them most effectively; what experience, in the widest sense, we provide to our people in return for their loyalty and dedication.

Our Funders....is the heading under which we consider the sources of funding that we might most appropriately target; whether we should do more to 'contract' for the provision of our services, earning income as well as fundraising; what more we need to do in order to communicate our aims and our needs to potential sources of funding.

Our Charity....covers the infrastructure of our organisation: its financial operations- how we invest our funds and handle our financial affairs; marketing- how we raise Cruse's profile; internal and external communications; and thought leadership- how we exercise the greatest influence on policy issues affecting bereaved people.

Our aim is to create a virtuous circle encompassing these four domains:



If we can reach more clients and provide further services to them, we are more likely to attract funding; if we attract more funding, we can strengthen our charity and enhance its profile; if our charity is stronger, we can do more to recruit, develop and retain our people; if we have more high quality people, we can provide further services to more clients.....

Strategic Priorities

Our review identified eight strategic priorities. They are set out below within the domain to which each belongs.

Our Clients

1. To make Cruse accessible to a wider client base

Cruse is the only nationwide bereavement charity and is contacted by a large number of people each year. And yet we know that we are not meeting demand from all potential users and are not reaching parts of the community. We must aim to make our services available in locations, including some London boroughs and larger cities, where we are not represented; recruit more volunteers and staff where numbers fall short of the required target levels; and take steps to ensure that the spread of our clients reflects the composition of the local population. We will also work to achieve optimum use of the Cruse website and Helpline to extend our reach.

2. To improve our evaluation of Cruse services

We know from observation and long experience that the care provided by Cruse bereavement volunteers is beneficial. But we need to extend and improve our evaluation of the services that we provide so that we can work for their continuous improvement and demonstrate to potential funders the value of our contribution. This calls for stronger arrangements to collect and analyse client feedback and to collate statistical evidence of our coverage and impact that we can use in assessing needs, in planning and developing our services and adapting our training courses.

Our People

3. To recruit and retain Cruse volunteers and staff from a wider base

We need more bereavement volunteers and more staff and management volunteers to support them if we are to extend our coverage. And to accomplish this increase in numbers it is only sensible to look for recruits among groups which have been under-represented in the past. We need more

young people, more people from ethnic communities and more men if we are aiming to make the spread of our volunteers and staff, like the profile of our clients, more representative of the communities that they serve. And, recognising that retention is always an easier and less expensive means of meeting resource needs than recruitment, we also need to value and support existing volunteers in order to retain their skills and experience.

4. To provide opportunities for continuing professional development for all Cruse volunteers and staff

The most effective way of retaining our volunteers and staff is to ensure that they are valued and provided with the opportunities to contribute and to develop their skills, which meet their aspirations. Our volunteers join Cruse for a variety of reasons. While all are motivated by a wish to help bereaved people, some are also looking for training and experience which will further their careers. Whatever their immediate motivation, all will value the opportunity for self-development. We will take steps to achieve continuous improvement in our training, from induction to specialist courses. We must also respond to feedback from our volunteers and staff, and consider how best to improve their whole 'experience' of working with Cruse- their motivation, supervision and sense of belonging.

Our Funders

5. To raise Cruse's profile and make potential funders more aware of our services

Competition for funding within the voluntary sector becomes ever more intense. To ensure that we receive the money that we need, we must not only continue to deliver a service of the highest quality to bereaved people but must be seen to be doing so. At present our charity's profile is too low and its name is not widely recognised. We need to take steps to overcome these problems, find a memorable strap line, plan an awareness campaign, perhaps associated with Cruse's 50th anniversary in 2009, explore the possibility of sponsorship links with appropriate funders and train our people to feel more at ease when addressing the need to generate income.

6. To ensure a diverse range of funding sources with increasing reliance on contracted income

There is no single appropriate source of funding for a charity like ours. In the past Cruse has benefited from corporate and trust funding, but renewed effort is needed to replace corporate funding arrangements which have recently come to an end. We also need to take stronger measures to establish a stream of individual donations and legacies. Above all, perhaps, we should stress the considerable financial value of the services that Cruse provides to the community, and take a more proactive approach in seeking Service Level Agreements with the public sector bodies- Primary Care Trusts, Local Authorities and other agencies- which benefit from them. Evidence of the effectiveness of our services gathered through stronger evaluation will be valuable in approaching all sectors.

Our Charity

7. To create a more cohesive organisation working together, nationally and locally, to achieve priorities

Our widespread network of branches is both a remarkable achievement and a considerable asset, but it also presents challenges. Without losing the energy and creativity fostered in local branches with

a high degree of autonomy, we must recognise that Cruse Bereavement Care is one organisation, and ensure that we do not lose the opportunities for cost reduction and the sharing of ideas that we should gain from a national structure. We will press on with the formation of areas, where this will ease the burden of management and administration on branches; improve internal financial controls and review arrangements for cost sharing; and review the potential for greater use of e-mail and the website for improved communication. Above all, we want to enhance the volunteer's and staff member's sense of belonging to a charity with a national profile and purpose.

8. To promote the expertise of Cruse as a thought leader and enhance its influence on those working with bereaved people

As Cruse's reputation in its specialist field has grown, it has increasingly contributed to debate on issues affecting bereaved people. It frequently works with central government on relevant policy issues; and we must continue this work and seek reimbursement of its cost, encourage recognition that bereavement raises issues of public significance which cut across many Government Departments and position Cruse as a leading source of influence in pressing the needs of bereaved people. Our charity also fosters debate, learning and research through its publications and the hosting of conferences. All this should continue; but we plan too that Cruse's influence could be felt more widely by its increased involvement in the provision of external training and by targeted development of further links with General Practitioners, the nursing profession and academic institutions. Demonstration of thought leadership in this way will both fulfil an essential element of Cruse's mission and raise its profile with the public at large.

Putting Strategy into Practice

Too many strategy reviews stimulate debate for a time and are then consigned to a convenient bookshelf, to be rediscovered only when the next review is proposed. We need to ensure that the strategic priorities defined by this review are turned into actions. As a first step the Business Plan for Central Activities 2006-2009 will propose a set of practical actions with measurable targets, which are designed to move our charity towards achievement of each of its strategic priorities. It is envisaged that the various Regions, Areas and Branches of Cruse will follow suit, and structure their own plans, however formal or informal, within those strategic priorities so that we can work together towards a successful continuation of our charity's work.